# Sites

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When highlighting the Sites menu option from the customer tree, the Active Pane will display a list of all Site records that exist for the Customer.

Expanding the tree of a single site will display a list of Site Tree Options.

## Systems

When highlighting the Systems menu option within the Site Tree, the Active Pane will display a list of all System records that exist for that Site. Right-Clicking on the Systems tree option will display two options; New System and Refresh.

## Contacts

When highlighting the Contacts menu option within the Site Tree, the Active Pane will display a list of all active and inactive Site Contact names for the Site.

Right-clicking on the Contacts menu option will display the option of New Site Contact. Selecting this option will open a blank New Contact data entry form. Site Contacts are typically names that are available to call for Service inquiries.

## Credit Memos

When highlighting the Credit Memos tree option, the Active Pane will display a list of all Credit Memos that have been posted for the Site. Right-clicking on the Credit Memos will display a list of the following options: Apply, New Credit Memo and Refresh Credit Memo.

Apply – If the customer has unapplied credit memos on their account, this option may be used to apply credits to open invoices. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

New Credit Memo – A new Credit Memo may be created by selecting this option. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Refresh Credit Memo – Selecting this option will refresh the Credit Memo list displayed in the Active Pane.

## Documents

When highlighting the Documents menu option, the Active Pane will display a list of all documents attached to the Site. Right-clicking on the Documents menu option will display a list of the following options: Add Existing Document and Scan New Document. The SedonaDocs add-on module must be purchased to use the Documents options.

Add Existing Document – Selecting this option will open the Add Document form where the User will select an existing file to attach to the Site record.  For more information on this process see SedonaDocs.

Scan New Document – Selecting this option will open the SedonaDocs scanner interface.

### Inspections

When highlighting Inspections from the Site Tree, any Inspection setup records that exist for one of the Site's Systems will be displayed in the Active Pane.  An Inspection record may be opened for viewing and/or editing by double-clicking on the record displayed in the Active Pane.

There are no right-click options for the Inspections tree option at the Site level.  New Inspection records are created at the System level.

### Invoices

When highlighting the Invoices menu option, the Active Pane will display a list of all Invoices linked to the Site.  Right-clicking on the Invoices menu option will display a list of the following options: New Invoice, Create Cycle Invoice Now and Refresh.

New Invoice – A new Miscellaneous Invoice may be created by selecting this option.  User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Create Cycle Invoice Now – This option allows the User to generate a Cycle Invoice batch for this one customer.  User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Refresh – Selecting this option will refresh the Invoice list displayed in the Active Pane.

### Jobs

When highlighting the Jobs menu option, the Active Pane will display a list of all Jobs created for the Site.

Right-clicking on the Jobs menu option will display a list of the following options: New Job, Refresh, and Job Costing Report.

New Job – This option will open the new Job form for the Site.  User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Refresh – Selecting this option will refresh the Jobs information displayed in the Active Pane.

Job Costing Report – Selecting this option will open the Job Cost Summary report selection form.  This report is used when it is desired to view the Job Costing Information for multiple jobs for the site on one report.  When this form opens a list of all Jobs for the Site is displayed in the grid area.  Make the desired selections then click the OK button to generate the report.

## Notes

When highlighting the Notes menu option, the Active Pane will display a list of all Notes created for the Site.

Right-clicking on the Notes menu option will display one option; Add Note.

Right-clicking on the Notes menu option will display one option; Add Note.  Selecting this option will open the Note form.  Enter the desire text, and select a security Access Level.  If the Customer is currently in an active Collection Queue, a field will be displayed at the lower right "Note for Current Collection Queue".  Checking this box prior to saving will save this note as a Collection Type note.

## Recurring

When highlighting the Recurring menu option, the Active Pane will display a list of all active Recurring Lines created a the Site level or System level.  In the Active Pane, if a recurring line displays N/A in the System column, this indicates the recurring was setup at the Site level.

Note:  It is recommended to setup recurring lines at the System level and not the Site level.

Right-clicking on the Recurring menu option will display a list of the following options: New Recurring, Create Cycle Invoice Now and Refresh.

New Recurring – Selecting this option will open a blank New Recurring form.  Typically, Recurring Lines are set up at the Site level if the services for which are being invoiced to the customer do not involve a System or if it is your company policy to set up recurring at the Site level.  Typically new recurring lines are set up at the System Level.  User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Create Cycle Invoice Now – This option allows the User to generate a Cycle Invoice batch for this one customer.  User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Refresh – Selecting this option will refresh the Recurring Lines list displayed in the Active Pane.

Include Past Cancelled – Selecting this option will display any previously cancelled recurring lines.

## Recurring History

When highlighting the Recurring History menu option, the Active Pane will display a list of all Recurring Line activity for all Systems linked to the Site.  This includes increases, decreases and deletion of Recurring Lines.  Double-clicking on a Recurring Line History record in the Active Pane will open the record for viewing and editing certain fields.

There are no right-click options for Recurring History.

Double-Clicking on a Recurring History record will open the record for viewing/editing. Editable fields are Item Code, Effective Date, RMR Reason Code and Comments.

### Recurring Master Items

Recurring Master Items allows a User to enter a detailed Memo and/or a customer Purchase Order Number and Expiration Date for Sub Items Of that are selected when creating recurring lines. The information entered into the form, Recurring Master Items, is currently for informational purposes only for most SedonaOffice customers. This information will only print on cycle invoices when selecting invoice forms Custom Form CS01 and CS07.

When a Recurring Line is created at the Site Level, and saved with a Sub Item Of selection, the Sub Item Of will appear under a the Customer Explorer Site tree option labeled Recurring Master Items. The User may open the Master Recurring Item record by double-clicking on the row within the Active Pane, to enter the desired information into this new form.

When highlighting the Recurring Master Items menu option, the Active Pane will display a list of all Sub Items Of setup for the Site level Recurring Lines. Double-clicking on a Recurring Master Item record in the Active Pane will open the record for viewing or editing.

When opening a Recurring Master Item for viewing, the User is able to edit or enter new information into the available data fields. To open the record for viewing or editing, either double-click on the Item shown in the Active Pane, or highlight the Item, right-click and select Edit.

### Service

Selecting the Service tree option will display a list of all Service and Inspection Tickets created for the System or Systems associated with the Site. This list will include both open and closed tickets.

A Service or Inspection ticket may be opened for viewing by double-clicking on the ticket row in theActive Pane. User permissions are required for this option; if the User does not have access to the Service Module, a ticket may not be accessed.

Right-clicking on the Service menu option will display a list of the following options: New Service Ticket and Refresh.

New Service Ticket – This option will open the new Ticket form; if there is more than one System record for the Site, a list will presented to the User from which to select. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.

Refresh – Selecting this option will refresh the Ticket information displayed in the Active Pane.

### Group Tickets

Selecting the Group Tickets tree option will display a list of all Group Inspection Tickets created for the System or Systems associated with the Site. This list will include both open and closed tickets. Group Tickets is an advance feature and is explained in detail within the SedonaSchedule topic group. This tree option is only displayed if our support team has activated this feature at your company's request.

A Group Inspection ticket may be opened for viewing by double-clicking on the ticket row in the Active Pane.  User permissions are required for this option; if the User does not have access to the Service Module, a ticket may not be accessed.

There are no right-click options for Group Tickets.